

CMI's 18th Annual LGBT Travel Survey

Community Marketing & Insights

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CMI's 18th Annual LGBT Travel Survey

November 2013





- San Francisco-based, LGBT Owned/Operated company founded in 1992 serves clients throughout the USA, Canada, Europe, South America, Australia and Japan
- 20+ years of consumer research, strategic consulting, marketing planning, communications, conference production and training services
- Conducted research and provided strategic consulting for leading brands, including Hyatt, Kimpton Hotels & Restaurants, Las Vegas Convention & Visitors Authority, Greater Fort Lauderdale Convention & Visitors Bureau, Visit Philadelphia, Canadian Tourism Commission, Stockholm Tourist Board, Japan National Tourism Organization, Prudential Financial, Wells Fargo Bank, Gallo Wineries, ABSOLUT, Aetna Insurance, Esurance, Target Brands, American Cancer Society, Kaiser Family Foundation, the US Census Bureau *and many more...*

CMI's 18th Annual LGBT Travel Survey

Who Did We Talk To?



- This report is based on approximately 3,100 LGBT respondents who reside in the United States, collected in November 2013.
- Respondents were recruited from Community Marketing & Insights' proprietary research panel.
- CMI's panel reflects the readership/membership/attendees of this broad range of over 250 LGBT focused media outlets, organizations and events. This means that the results summarized here are highly representative of consumers who are interacting with the LGBT community.

How Did We Talk To Them?



- 10 minute online survey conducted in October - November 2013.
- The survey was made available through an email invitation to a random subset of CMI's 70,000-member LGBT consumer research panel.
- As an incentive, respondents were given the option to enter a drawing for one of five \$100 prizes, or donate winnings to a charity of their choice.

CMI's 18th Annual LGBT Travel Survey

Part 1:

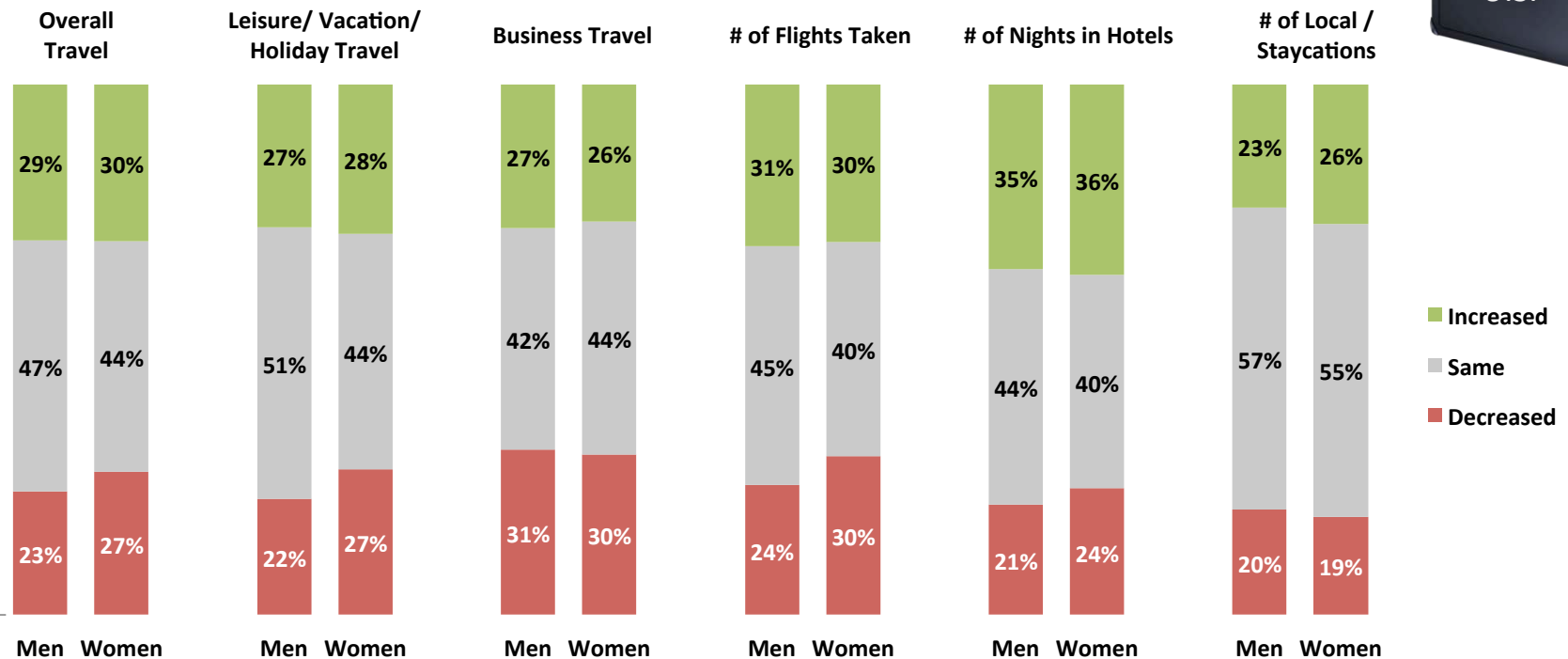
**Growth Trend Resumes, Although Slightly, for LGBT
Leisure Travel; Continued Softening of Business Travel**



LGBT travel growth trend is largely unchanged over the past 12 months, with small increases indicated for leisure travel. However, the trend towards a decrease in business travel continues from recent years.

4

Travel in Past 12 Months vs. Prior Year



Question: Comparing your travel during the past 12 months, to your travel in the 12 months before that, did you travel more, about the same, or less over the last year than in the previous year?

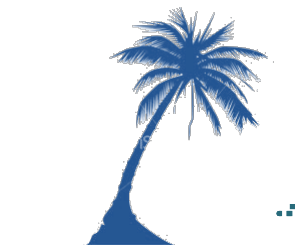
Base: Gay/Bisexual Men n=2,094; Lesbians/Bisexual Women n=983

*Gay/bisexual men are listed as men, Lesbians/bisexual women as women for ease of reporting.

Gay and bisexual men took an average of seven trips last year; four leisure trips and three for business. Lesbians and bisexual women took a similar number of leisure trips and one fewer business trip. These numbers are largely unchanged from last year.

How many total trips did you take in the past 12 months, where you stayed in paid accommodations at least one night?

Average # Trips, Past 12 Months



**Leisure /
Vacation**



BUSINESS TRIPS



**Gay/
Bisexual Men**



**Lesbians/
Bisexual
Women**



Age 25 - 44



Age 45 - 64

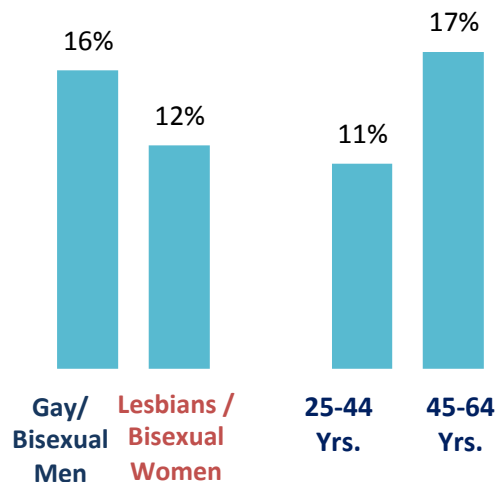
# TRIPS	4	4	4	3
# RT AIR FLIGHTS	3	2	3	3
# HOTEL NIGHTS	9	7	8	9
BUSINESS TRIPS	3	2	2	3

Base: Gay/Bisexual Men n=2,094; Lesbians/Bisexual Women n=983; 25-44 n=1,415; 45-64 n=1,402

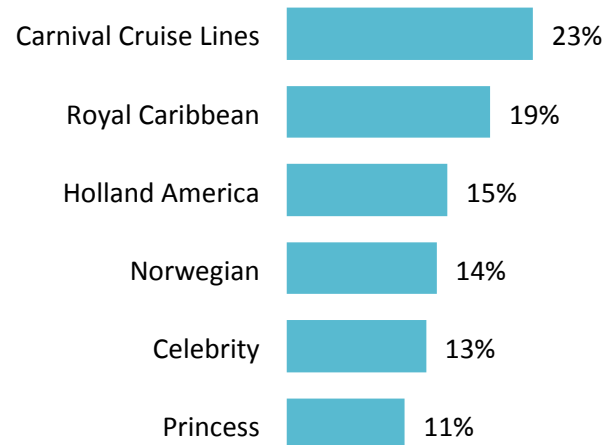
Cruises are more popular among men, and those who are 45-64 years of age. Leading preferred cruise lines are Carnival Cruise Line, Royal Caribbean and Holland America. Top LGBT charter cruise companies: Atlantis among men, Olivia among women.

Have you taken a cruise in the past 12 months on any of the following cruise lines or companies?

% Taking At Least One Cruise in Past Year



Top 6 Cruise Lines For USA LGBTs Taking A Cruise



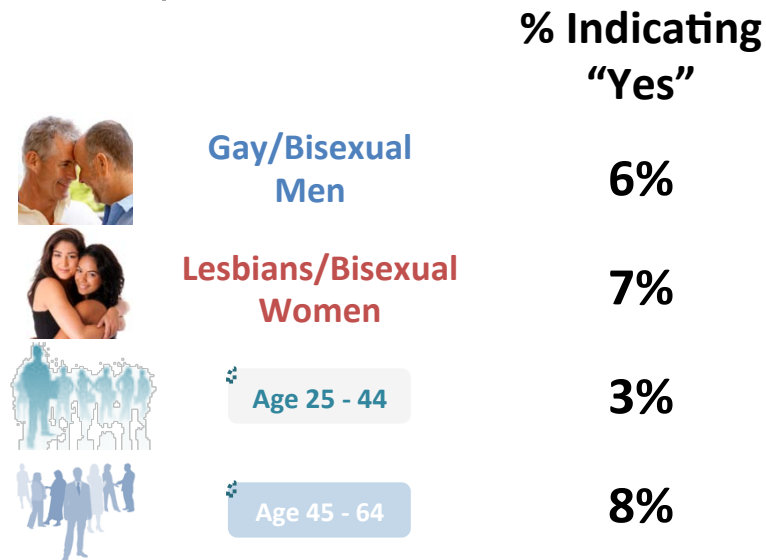
Of Gay Men and Lesbians Who Went on a Cruise... Top LGBT Charter Cruise Companies



Base: USA LGBT n=3,184; Gay/Bisexual Men n=2,094; Lesbians/Bisexual Women n=983; 25-44 n=1,415; 45-64 n=1,402

Fewer than 10% of LGBT respondents reported taking an organized tour of any kind in the past year.

In the last 12 months, have you taken an organized tour (involving three nights or more) with a tour company?



Base: Gay/Bisexual Men n=2,094; Lesbians/Bisexual Women n=983; 25-44 n=1,415; 45-64 Years n=1,402

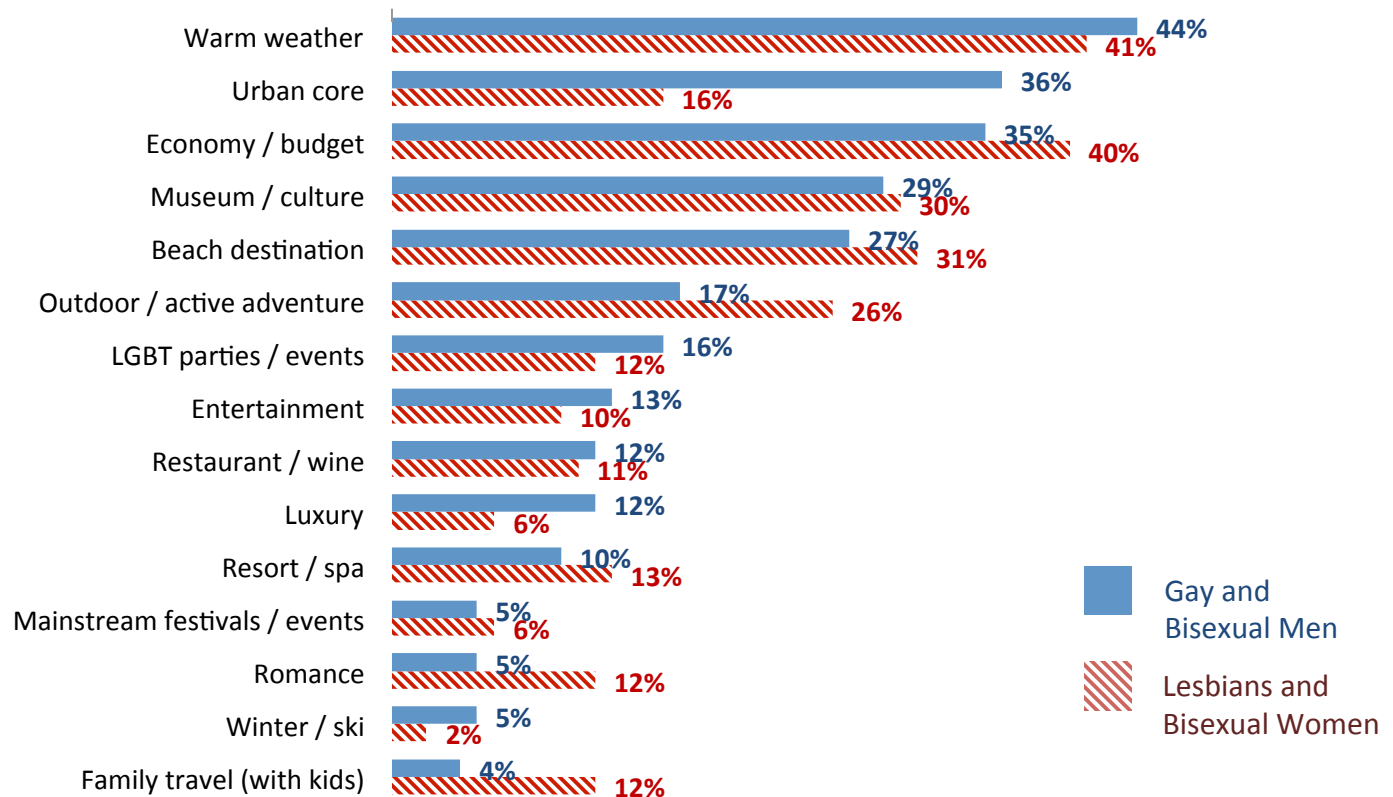
CMI's 18th Annual LGBT Travel Survey

Part 2: Travel Motivations, Trends and Frequency



By Gender: When asked to pick their “travel style,” we found significant gender differences. Gay and bisexual men are far more likely to describe themselves as urban core travelers. Lesbian and bisexual women favor outdoor adventure. But one thing that more agree on is warm weather.

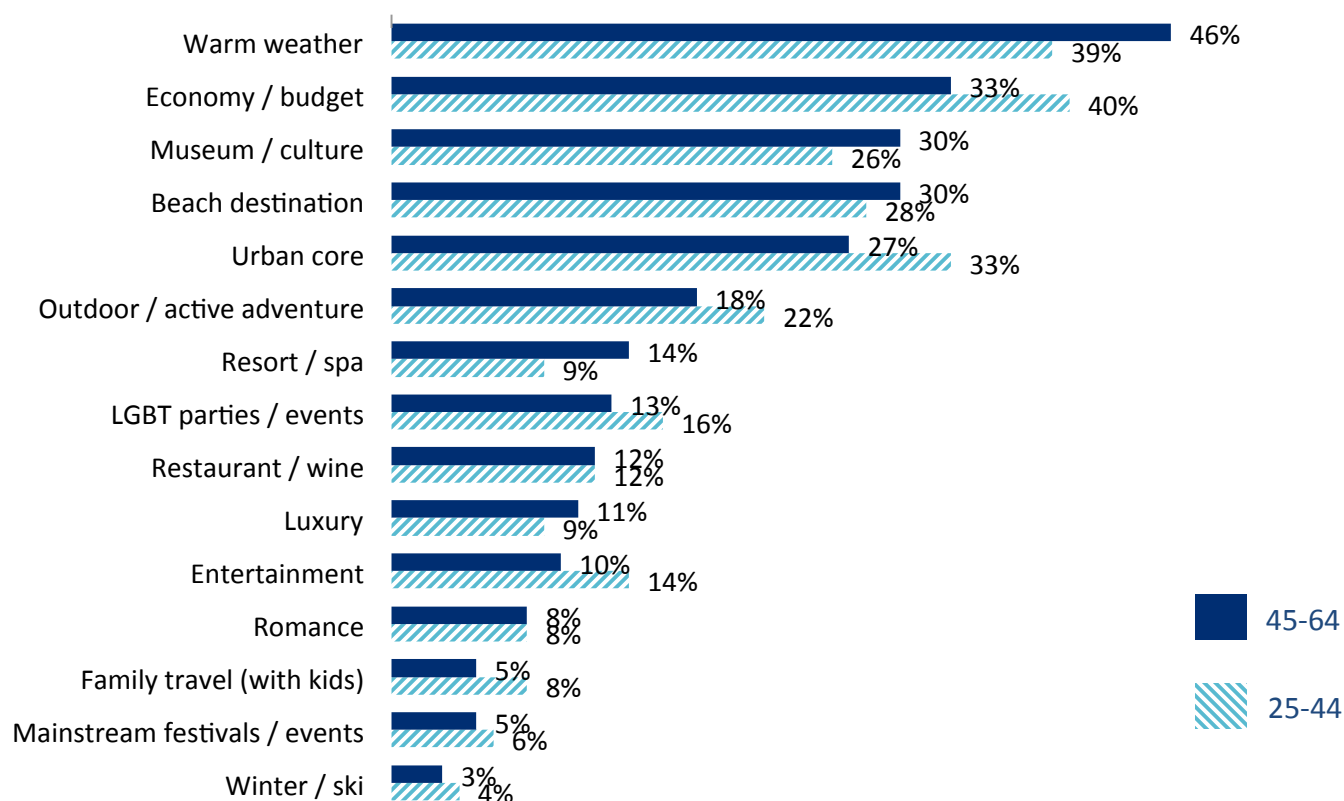
Looking back at all your travel over the last few years, what “kind” of traveler are you? (Mark up to 3)



Base: Gay/Bisexual Men n=2,094; Lesbians/Bisexual Women n=983

By Age: Similarly, age influences how respondents describe their travel personalities. Older LGBTs are primarily warm weather travelers. Younger LGBTs are more likely than older LGBTs to describe themselves as budget, urban core, outdoor adventure travelers.

Looking back at all your travel over the last few years, what “kind” of traveler are you? (Mark up to 3)



Base: 25-44 n=1,415; 45-64 n=1,402

Mid-range hotels are by far the most popular choice in the LGBT community. However, community choices are quite widespread among many categories. 1 in 4 women indicated using hotel alternatives compared to 1 in 5 men.



When traveling for leisure or vacation in the past 12 months, what type of accommodation did you most often book?



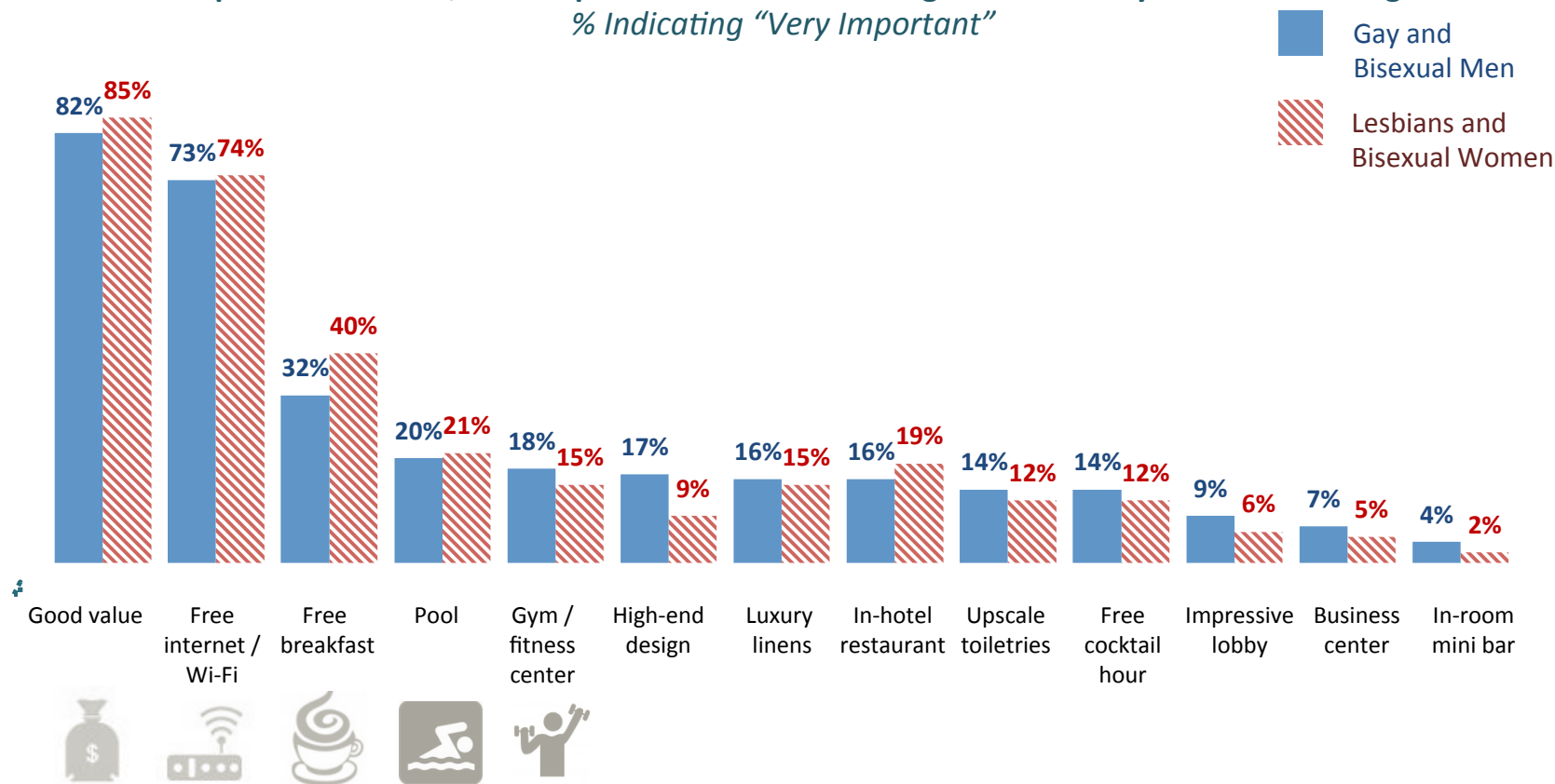
	Gay/Bisexual Men	Lesbians/ Bisexual Women	Age 25 - 44	Age 45 - 64
Mid-range hotel	39%	40%	39%	40%
Boutique hotel	13%	8%	13%	11%
Stayed free with family or friends	12%	16%	15%	10%
Budget hotel	12%	13%	11%	12%
Luxury hotel	12%	8%	10%	11%
Rented apartment / condo / house	5%	6%	5%	6%
My own timeshare / fractional ownership unit	2%	4%	1%	3%

Base: Gay/Bisexual Men n=2,094; Lesbians/Bisexual Women n=983; 25-44 n=1,415; 45-64 n=1,402

By Gender: Good value price for accommodation and free internet are the two most important motivators while booking a hotel, for both men and women. High-end design is significantly more important to men than women.

Other than price or location, how important are the following amenities to you when booking a hotel?

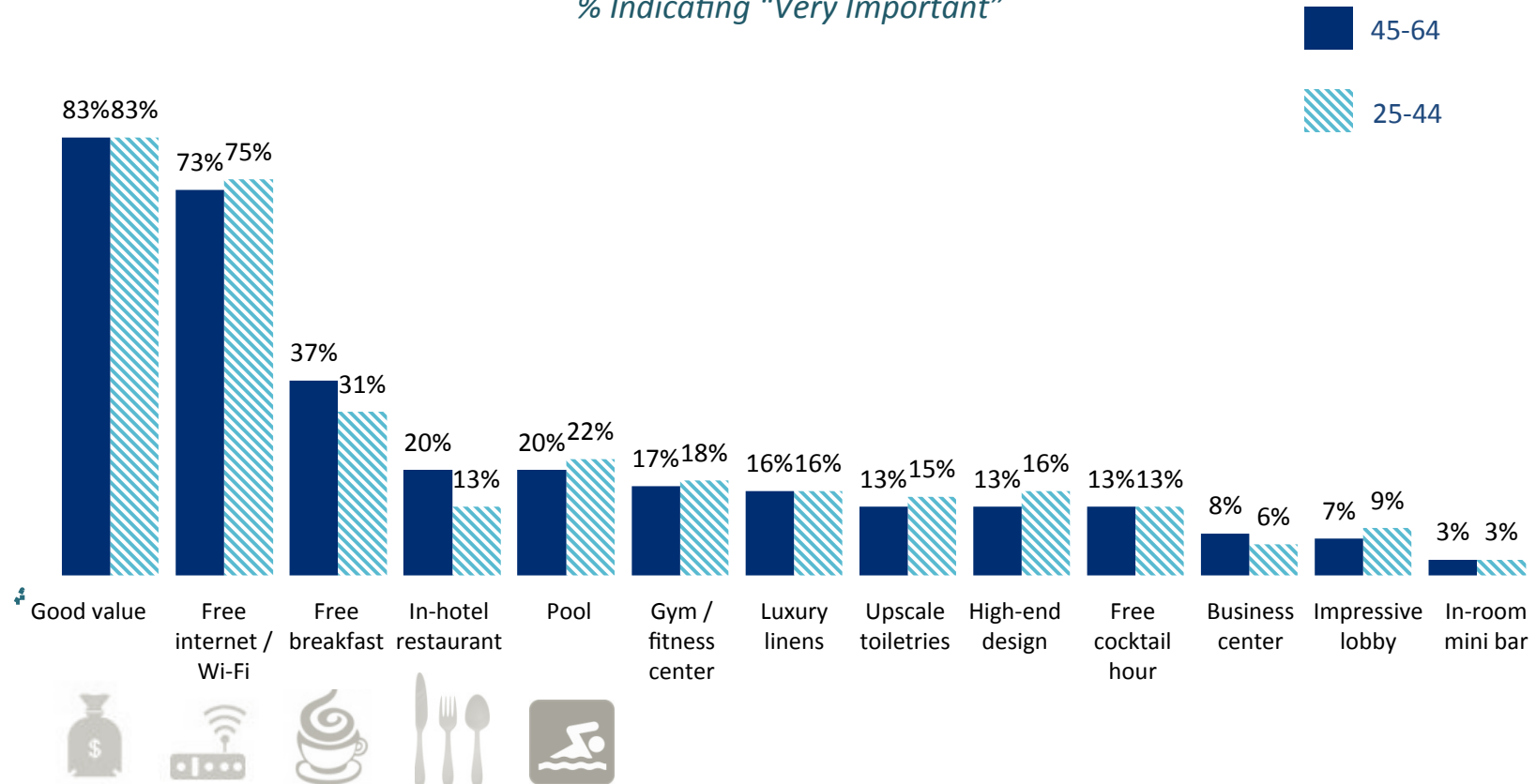
% Indicating "Very Important"



Base: Gay/Bisexual Men n=2,094; Lesbians/Bisexual Women n=983

By Age: Good value price for accommodation and free internet are the two most important motivators while booking a hotel, for all age groups. Of note regarding older LGBTs, hotel restaurants are significantly more important.

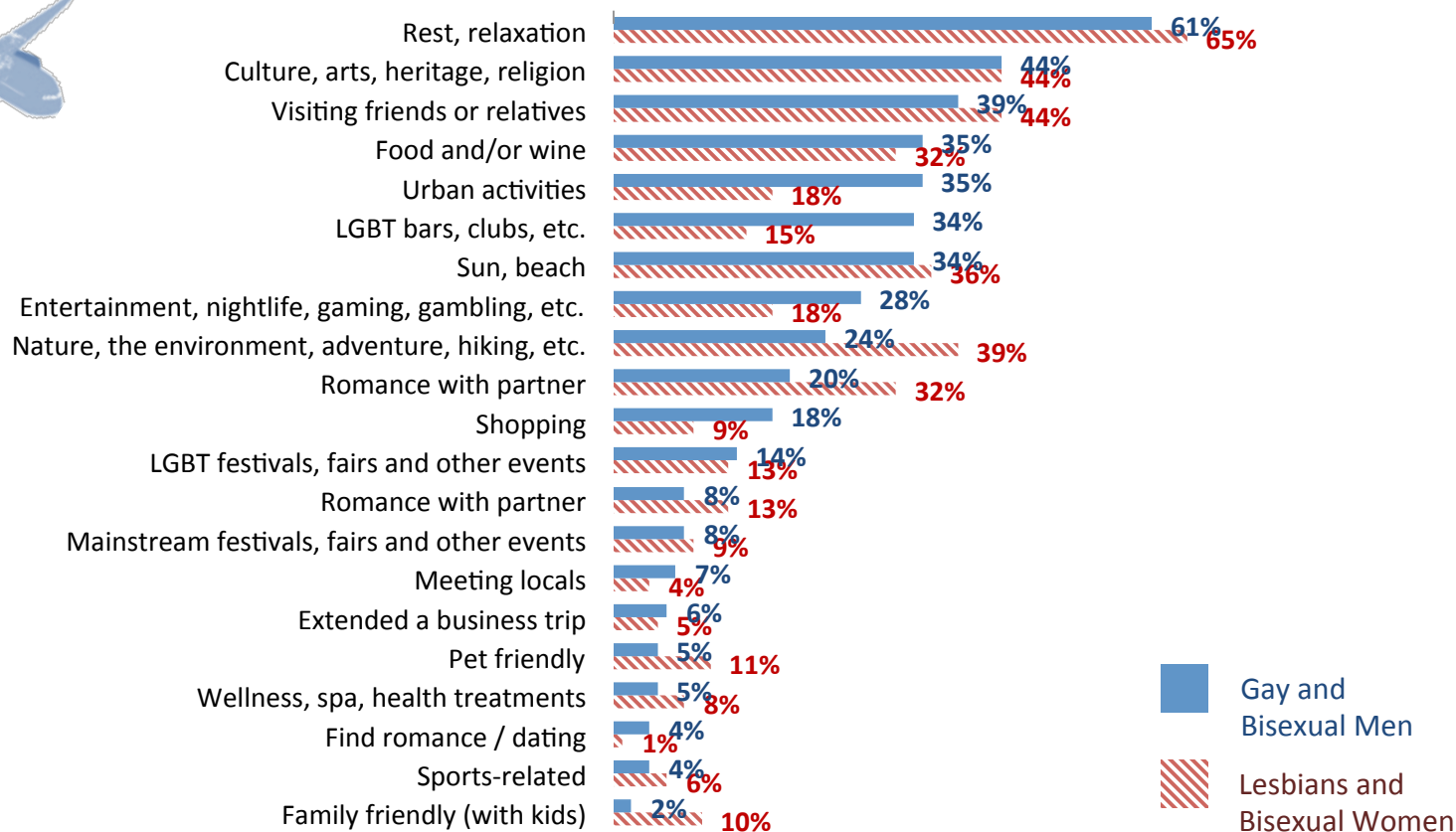
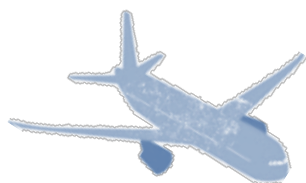
Other than price or location, how important are the following amenities to you when booking a hotel?
% Indicating "Very Important"



Base: 25-44 n=1,415; 45-64 n=1,402

By Gender: Rest and relaxation is the main motivator for any LGBT vacation, with other interests being widely disbursed. Romance with partner and nature are far more important to lesbians and bisexual women. An LGBT scene is far more important to gay and bisexual men.

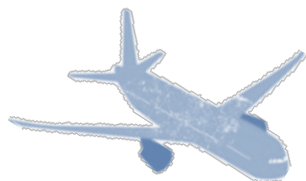
Other than price, what were your main interests when picking a destination for vacation? (Choose up to five)



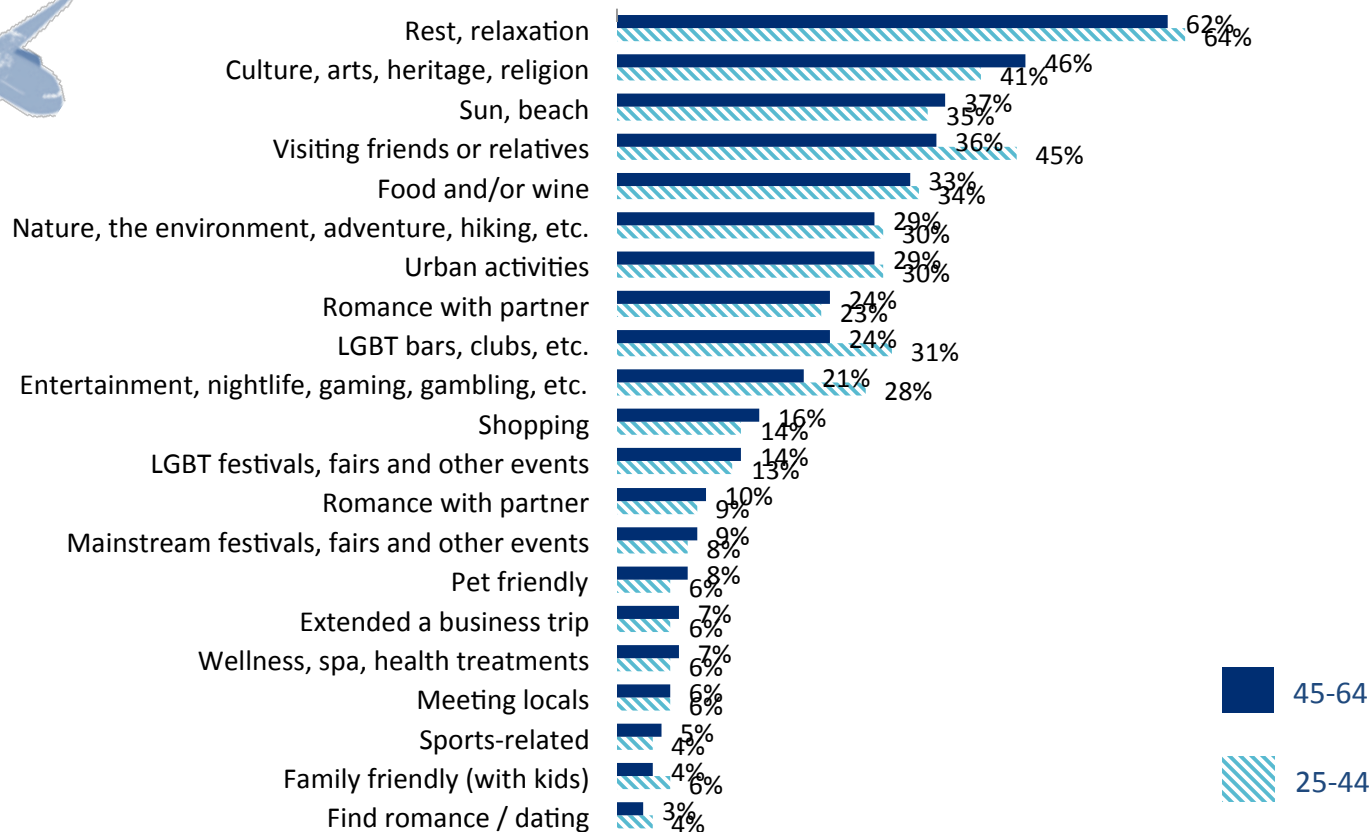
Base: Gay/Bisexual Men n=2,094; Lesbians/Bisexual Women n=983

By Age: Younger LGBTs are much more motivated by visiting friends, entertainment and LGBT nightlife.

4



Other than price, what were your main interests when picking a destination for vacation? (Choose up to five)




Base: 25-44 n=1,415; 45-64 n=1,402

Parents: When traveling with children, the majority of LGBT parents are motivated by child-friendly destinations as well as child-friendly hotels, over LGBT-friendly destinations and hotels.

When traveling with your children, what is more important to you and your family, when you are choosing a vacation destination/hotel?

Among Parents

 LGBT-Friendly

 Child-Friendly

Picking a Destination

Picking a Hotel



**Gay/Bisexual
Men**



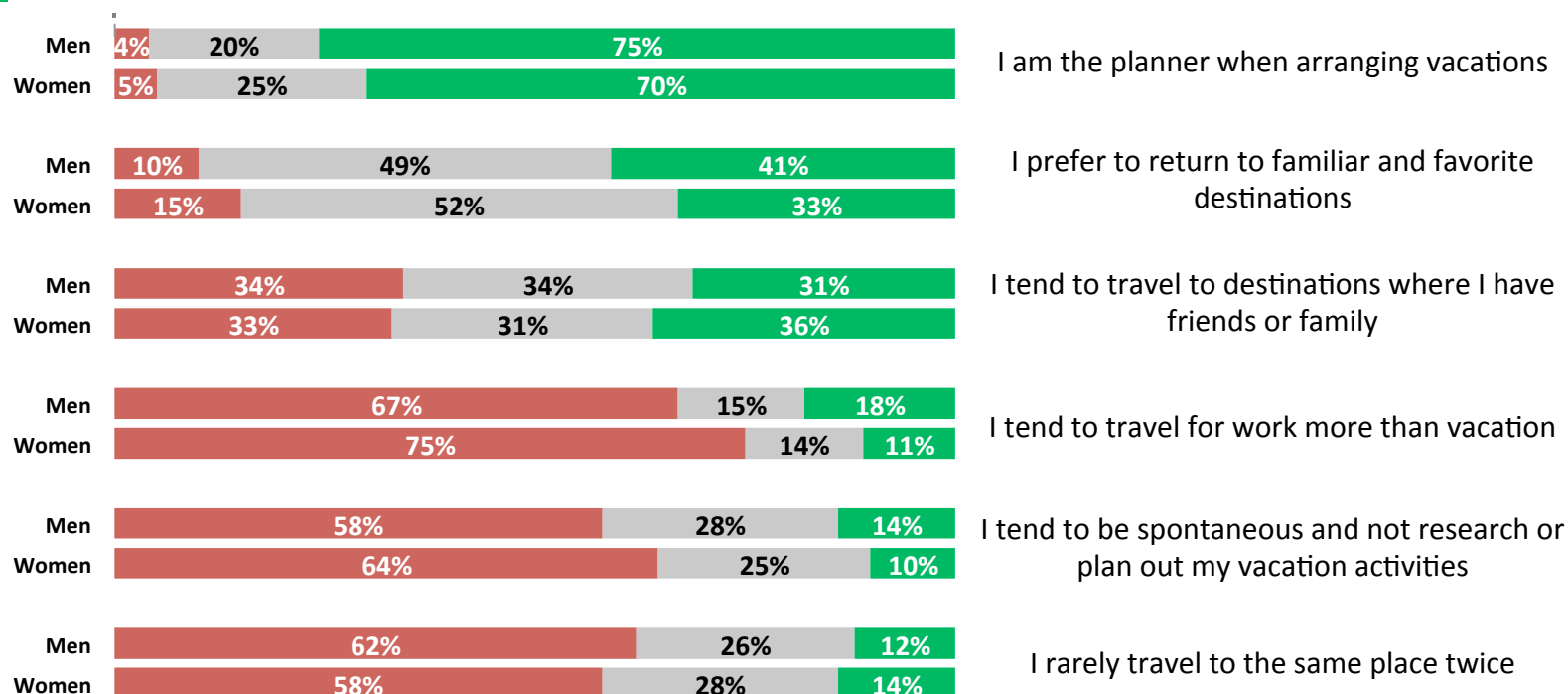
**Lesbians/Bisexual
Women**



Base: Gay/Bisexual Men n=64; Lesbians/Bisexual Women n=141

Most LGBTs view themselves as planners when it comes to vacation travel (shown by gender).

Do you agree or disagree with the following statements about your travel habits?



Base: Gay/Bisexual Men n=2,094; Lesbians/Bisexual Women n=983

*Gay/Bisexual Men are listed as Men, Lesbians/Bisexual Women as women for ease of reporting.

By Gender: For both men and women, Pride remains the top LGBT event influencing travel. Bear events are doing quite well for gay and bisexual men, while women's events of all kinds are doing well for lesbians and bisexual women.

In the past 12 months, have you traveled to another city (requiring an overnight stay) to attend any of the following community events? (Mark all that apply)



Rank	Destination	% Visited
1	LGBT Pride event	19%
2	Bear community event	7%
3	LGBT cultural, arts or film event	6%
4	LGBT theme event (like "Gay Days" in Orlando)	6%
5	LGBT professional association meeting or conference	5%
6	Leather community event	5%
7	LGBT circuit party / dance event	4%
8	LGBT sports tournament	2%



Rank	Destination	% Visited
1	LGBT Pride event	16%
2	Lesbian community event	11%
3	Women's event (not lesbian-specific)	7%
4	LGBT cultural, arts or film event	6%
5	LGBT professional association meeting or conference	5%
6	LGBT circuit party / dance event	2%
7	LGBT theme event (like "Gay Days" in Orlando)	2%
8	LGBT families event	2%

Base: Gay/Bisexual Men n=2,094; Lesbians/Bisexual Women n=983

By Age: Pride event related travel is very popular for LGBTs of all ages, even younger LGBTs.

4

In the past 12 months, have you traveled to another city (requiring an overnight stay) to attend any of the following community events? (Mark all that apply)

45-64 Years

Rank	Destination	% Visited
1	LGBT Pride event	16%
2	LGBT cultural, arts or film event	7%
3	LGBT professional association meeting or conference	5%
4	Bear community event	5%
5	LGBT theme event (like "Gay Days" in Orlando)	4%

25-44 Years

Rank	Destination	% Visited
1	LGBT Pride event	22%
2	LGBT cultural, arts or film event	6%
3	LGBT professional association meeting or conference	5%
4	LGBT circuit party / dance event	5%
5	LGBT theme event (like "Gay Days" in Orlando)	5%

Base: 25-44 n=1,415; 45-64 n=1,402

Gay men are far more likely to have spent a night in an LGBT-dedicated guesthouse. Interest in LGBT-dedicated properties increases with age.

In the past 12 months have you spent a night in an LGBT-dedicated hotel or guesthouse?



**Gay/Bisexual
Men**

% Indicating
“Yes”

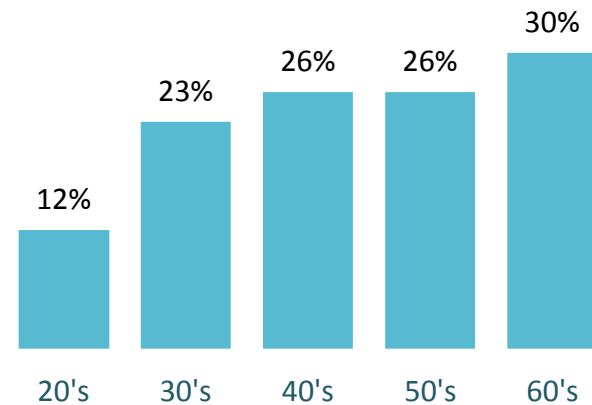
24%



**Lesbians/Bisexual
Women**

12%

LGBT-dedicated hotel/
guesthouse booking increases
with age among gay and
bisexual men.



Base: Gay/Bisexual Men n=2,094; Lesbians/Bisexual Women n=983

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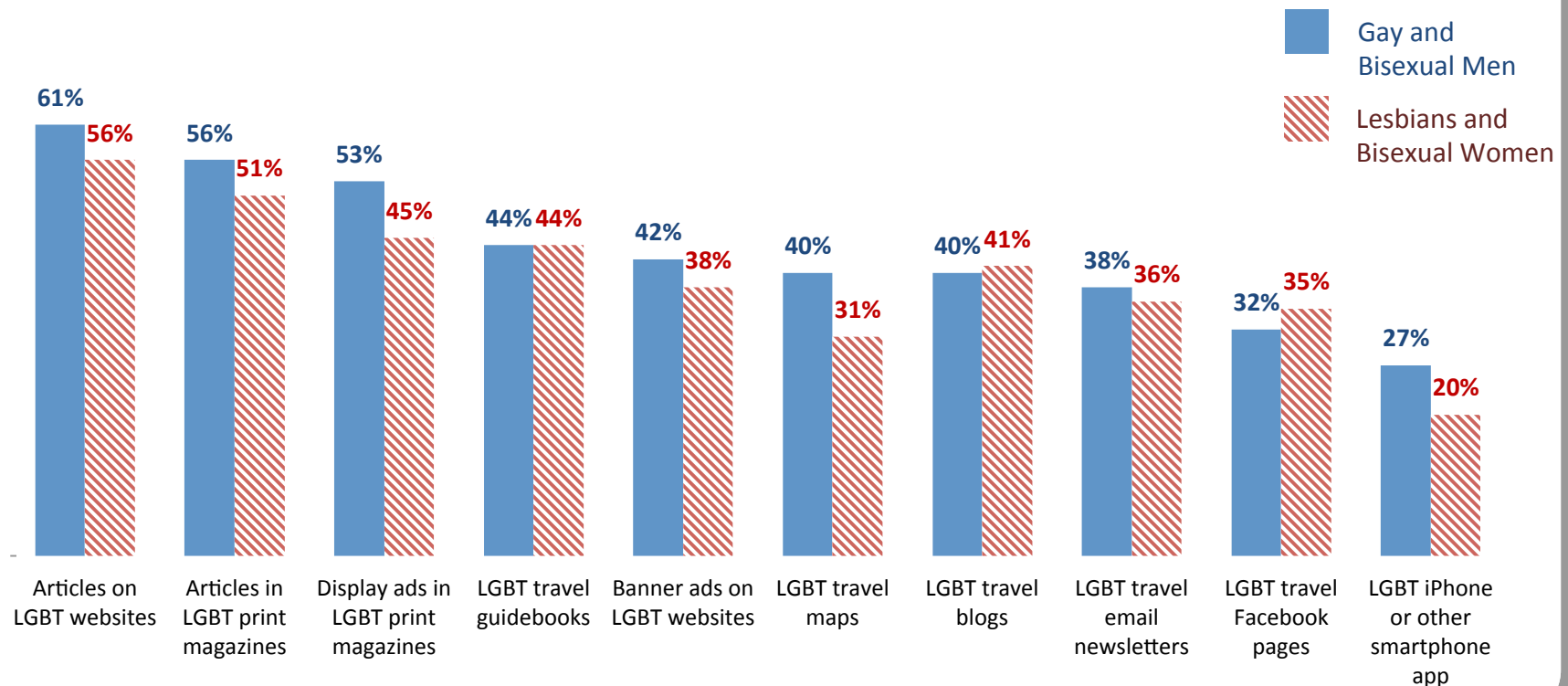
Part 3: Research, Booking & Purchasing



By Gender: Destination selection is most influenced by articles on LGBT websites, for both men and women. Both segments also take cues from articles and display ads in LGBT print magazines.

Within the LGBT media, what has influenced you over the past 12 months when researching and making your destination selections?

% Indicating Major or Some influence

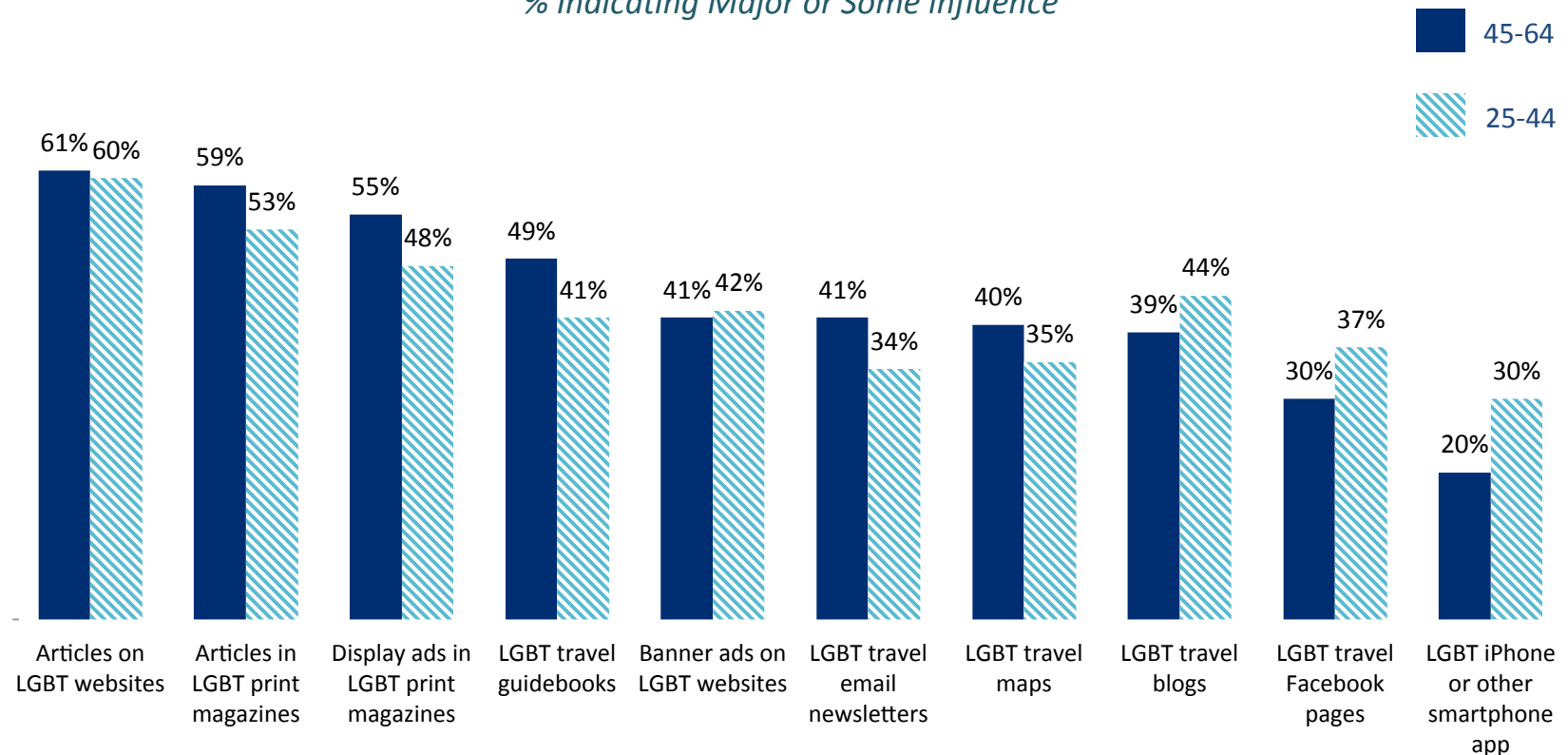


Base: Gay/Bisexual Men n=2,094; Lesbians/Bisexual Women n=983

By Age: Destination selection is influenced by articles on LGBT websites for all ages. Older LGBTs are more influenced by print media than younger LGBTs. Younger LGBTs are much more influenced by LGBT travel blogs than are older LGBTs.

Within the LGBT media, what has influenced you over the past 12 months when researching and making your destination selections?

% Indicating Major or Some influence

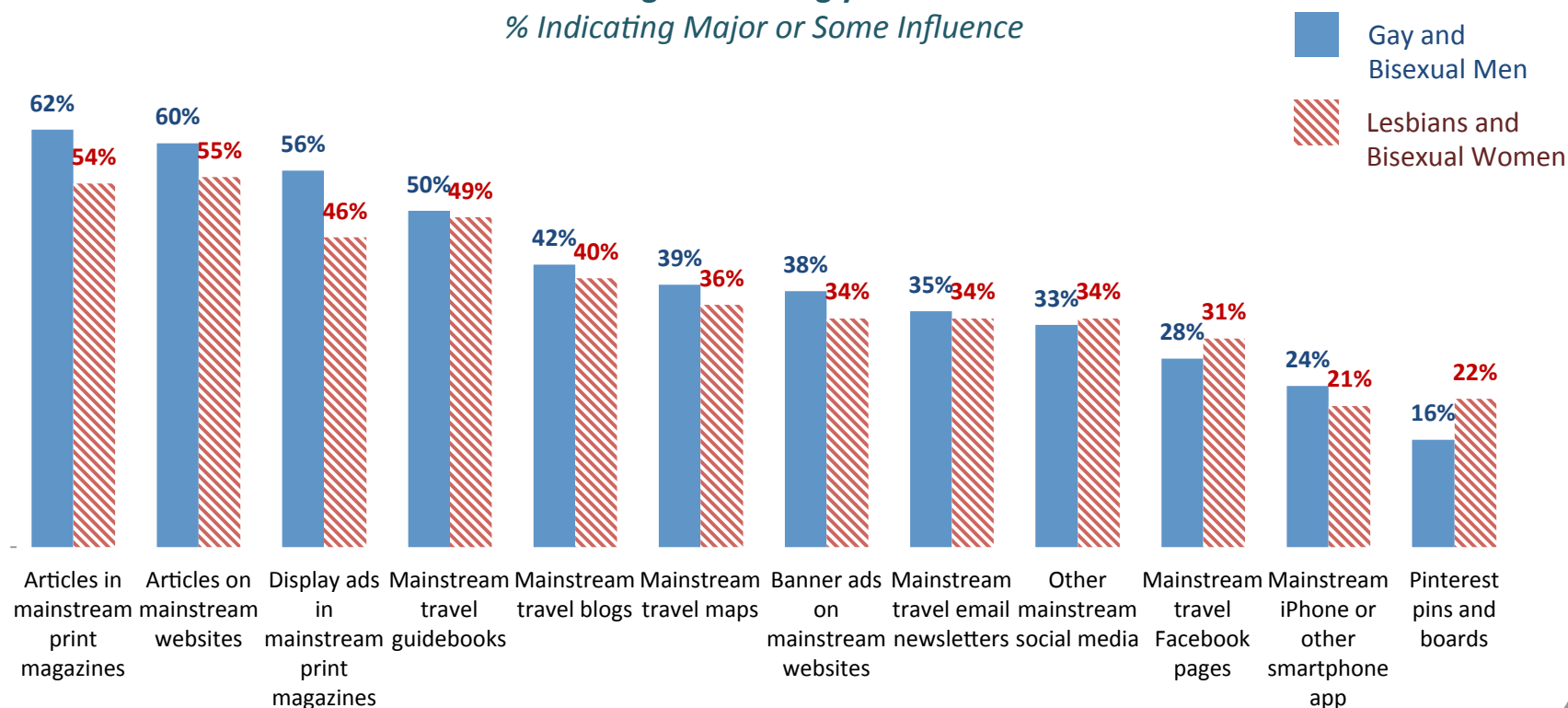


Base: 25-44 n=1,415; 45-64 n=1,402

By Gender: Within the mainstream media, print magazines continue to play an influential role for both men & women.

Within the mainstream or general media, what has influenced you over the past 12 months when researching and making your destination selections?

% Indicating Major or Some Influence

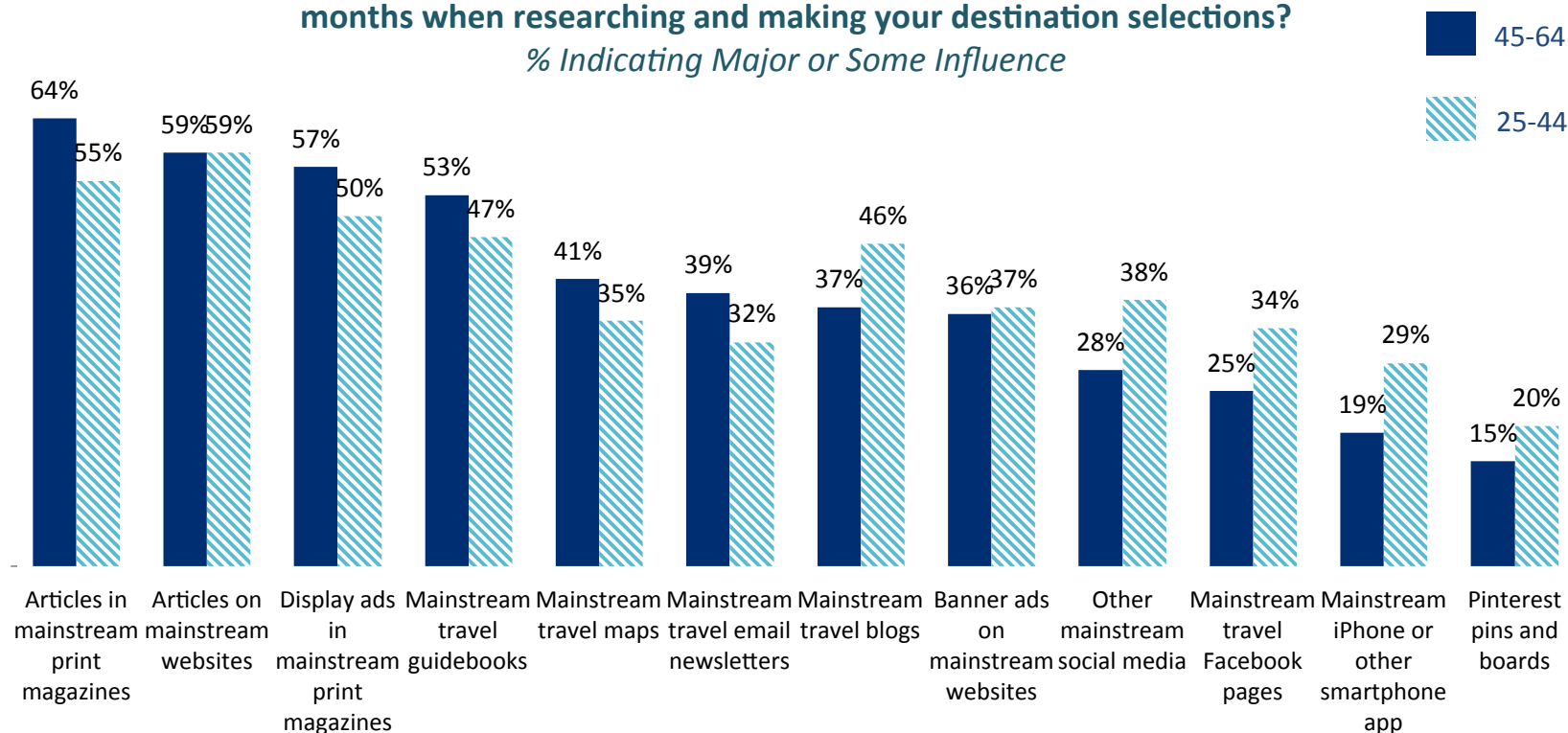


Base: Gay/Bisexual Men n=2,094; Lesbians/Bisexual Women n=983

By Age: However, the influence of mainstream print magazines is far greater among older LGBTs, while younger LGBTs turn more to mainstream internet sites.

Within the mainstream or general media, what has influenced you over the past 12 months when researching and making your destination selections?

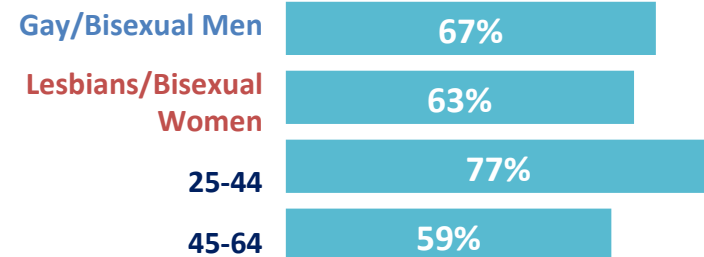
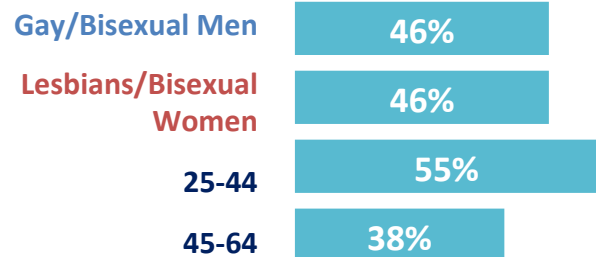
% Indicating Major or Some Influence



Base: 25-44 n=1,415; 45-64 n=1,402

Younger LGBTs are much more likely to use their mobile devices for trip planning and information, both before and during a trip.

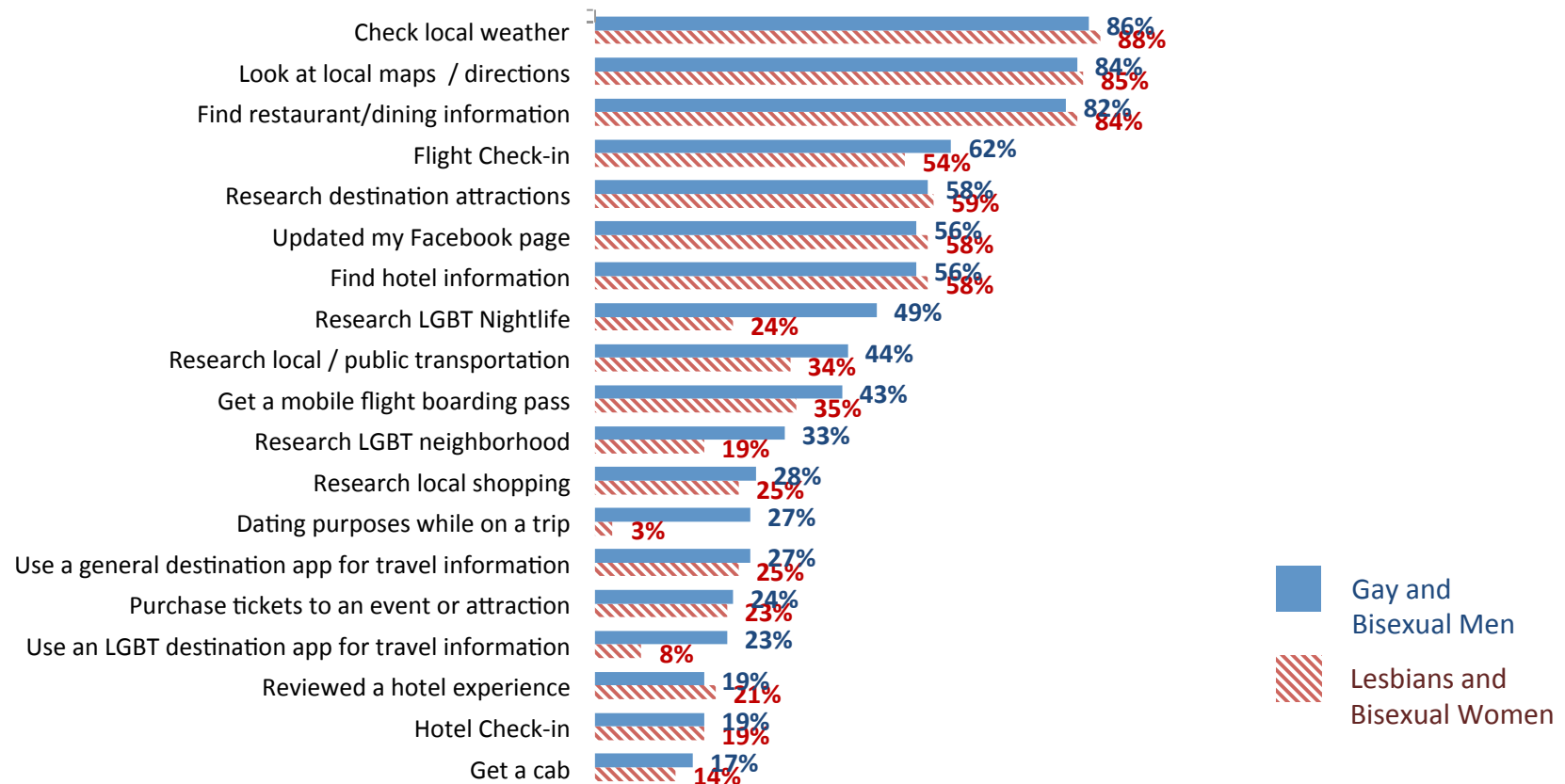
In the past 12 months, did you use a mobile device for travel information?



Base: Gay/Bisexual Men n=2,094; Lesbians/Bisexual Women n=983; 25-44 n=1,415; 45-64 n=1,402

By Gender: Both men and women use mobile devices for a wide variety of travel-related purposes, especially checking local weather, looking at maps to get directions and to find about restaurants/dining.

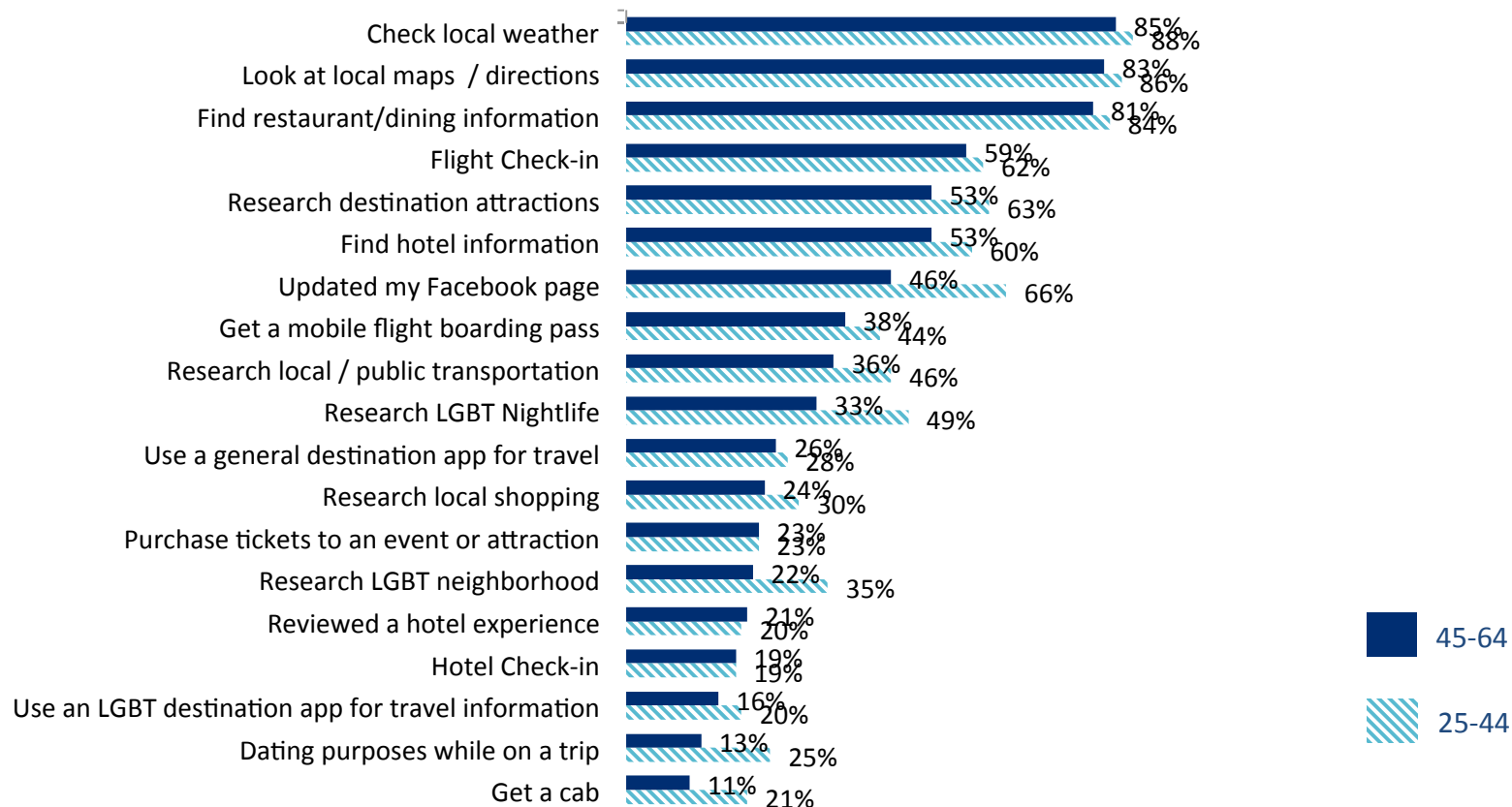
What did you do using your mobile device? (Check all that apply)



Base: Gay/Bisexual Men n=1,476; Lesbians/Bisexual Women n=679

By Age: Younger LGBTs use their mobile devices far more than older LGBTs, especially updating Facebook pages, researching attractions, researching nightlife and for dating purposes.

What did you do using your mobile device? (Check all that apply)



Base: 25-44 n=1,142; 45-64 n=875

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Part 4: Destination Ranking & Hotel Brand Recall



Top U.S. Destinations | Leisure + Business | U.S. LGBT



Rank	Destination	% Visited
1	New York City, NY	29%
2	Chicago, IL	24-25%
2	San Francisco, CA	24-25%
4	Las Vegas, NV	21-22%
4	Los Angeles / West Hollywood, CA	21-22%
4	Washington, DC	21-22%
7	Boston, MA	14-15%
7	Ft. Lauderdale / Wilton Manors, FL	14-15%
7	San Diego, CA	14-15%
10	Atlanta, GA	11-12%
10	Dallas, TX	11-12%

Rank	Destination	% Visited
10	Denver, CO	11-12%
10	Miami/ South Beach, FL	11-12%
10	New Orleans, LA	11-12%
10	Orlando, FL	11-12%
10	Palm Springs, CA	11-12%
10	Philadelphia, PA	11-12%
10	Seattle, WA	11-12%
19	Austin, TX	9-10%
19	Phoenix/Tempe/Scottsdale, AZ	9-10%
19	Portland, OR	9-10%
19	Tampa/St. Petersburg, FL	9-10%

Base: USA LGBT n=3,184

Top U.S. Destinations | Leisure Only | Gay & Bisexual Men

AMONG GAY MEN IN THE UNITED STATES

Rank	Destination	% Visited
1	New York City	23%
2	San Francisco	18%
2	Chicago	18%
2	Las Vegas	18%
5	Los Angeles / West Hollywood	15%
5	Washington, DC	15%
7	Ft. Lauderdale/Wilton Manors,	13%
8	Palm Springs	10-11%
8	Orlando	10-11%
8	San Diego	10-11%
8	Boston	10-11%
8	Miami/ South Beach	10-11%

Rank	Destination	% Visited
Rest of Top 20	Atlanta, Denver, Hawaii, Key West / Florida Keys, New Orleans, Philadelphia, Portland, Provincetown, Seattle	7% - 8%
Rest of Top 20	Austin, Baltimore, Dallas, Napa County, Sonoma County, Phoenix, Tampa/St. Petersburg	5% - 6%

Base: Gay/Bisexual Men n=2,094

Top U.S. Destinations | Leisure | Lesbians and Bisexual Women

AMONG LESBIANS IN THE UNITED STATES

Rank	Destination	% Visited
1	New York City	15%
1	San Francisco	15%
3	Las Vegas	13-14%
3	Chicago	13-14%
5	Los Angeles / West Hollywood	11-12%
6	Washington, DC	10%
7	Boston	8-9%
7	San Diego	8-9%
7	Orlando	8-9%
7	Seattle	8-9%

Rank	Destination	% Visited
Rest of Top 20	Atlanta, Hawaii, Provincetown, Portland, Sonoma County	7%
Rest of Top 20	Key West / Florida Keys, Miami/ South Beach, Napa County, Palm Springs. Philadelphia, Tampa/St. Petersburg	5-6%

Lesbians/Bisexual Women n=983

Top U.S. Destinations | Business | U.S. LGBT



Rank	Destination	% Visited
1 st Tier	Chicago, New York City, San Francisco, Washington, DC	7+%
2 nd Tier	Atlanta, Dallas, Las Vegas, Los Angeles	5-6%
3 rd Tier	Austin, Boston, Denver, Houston, Orlando, Philadelphia, Portland, Phoenix, Seattle	3-4%

Base: USA LGBT n=3,165

Top International Destinations | Leisure | U.S. LGBT



Destination	% Visited
Canada	13%
England	7%
France	7%
Mexico	7%
Spain	6%
Germany	5%
Italy	5%
Montreal, Canada	5%
Toronto, Canada	5%
Vancouver, Canada	5%
Any Caribbean Island (non-cruise)	4%
Puerto Vallarta, Mexico	4%
Australia	3%
Netherlands	3%

Destination	% Visited
Cancun, Mexico	3%
Greece	2%
Thailand	2%
China (Mainland)	2%
Costa Rica	2%
Czech Republic	2%
Denmark	2%
Hong Kong	2%
Singapore	2%
Sweden	2%
Victoria, Canada	2%

Base: USA LGBT n=3,165

Top Travel Destinations | Leisure | Canadian LGBTs



Rank	Destination	% Visited
1	Montreal	27%
1	Toronto	27%
3	Vancouver	21%
3	New York City	21%
5	Seattle	13%
5	Las Vegas	13%
7	Calgary	11-12%
7	Ottawa	11-12%
7	Halifax	11-12%
7	San Francisco	11-12%
11	Banff	8-9%
11	Caribbean Island (non-cruise)	8-9%

Rank	Destination	% Visited
11	England	8-9%
11	Ft. Lauderdale/Wilton Manors	8-9%
11	France	8-9%
11	Quebec City	8-9%
11	Victoria	8-9%
11	Whistler	8-9%
19	Boston, Buffalo, Chicago, Hawaii, Los Angeles, Miami, Orlando, Palm Springs, Portland, Puerto Vallarta, Spain, Washington DC	6-7%

Note many ties, with % differences within margin of error.

Base: Canadian LGBTs n=464

In previous years, the survey asked participants to write in from memory the single brand that did the best job outreaching to the LGBT community. This year we allowed participants to write in up to three selections, increasing all brand percentages. The change in question format caused large increases for Hilton and Marriott, and small increases for the boutique brands of Kimpton and W. However, the top five brands remain unchanged from last year. Hilton remains the top brand chosen for the second year in a row.

4 Of all the hotel brands or chains in the world, which chain/brand does the best job outreaching to the LGBT community? (Write-in up to three)

Top Brands as Write-in from Memory



Base: USA LGBT n=1,477

CMI's 18th Annual LGBT Travel Survey

Part 5: Travel Information from other Recent CMI Reports

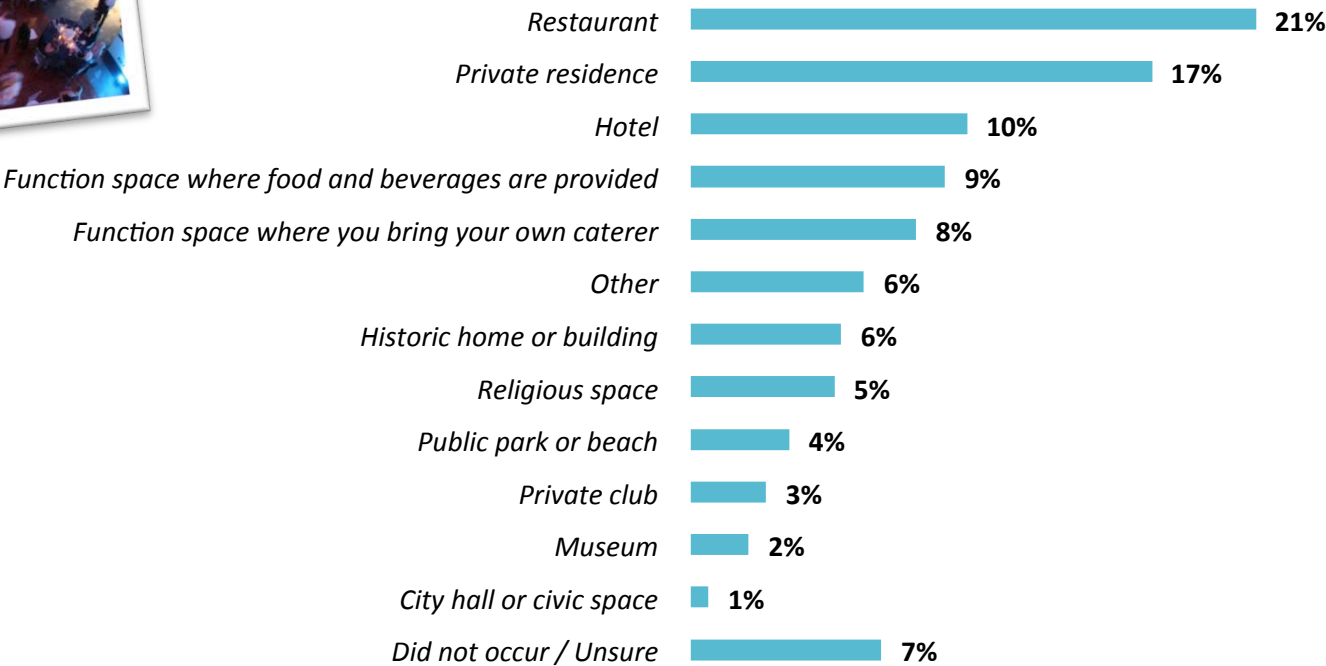


From CMI’s 2013 Same-Sex Wedding Survey: Same-sex couples use a wide variety of locations for their reception. About 10% used a hotel for their reception.



Where was your reception held or where will it be held?

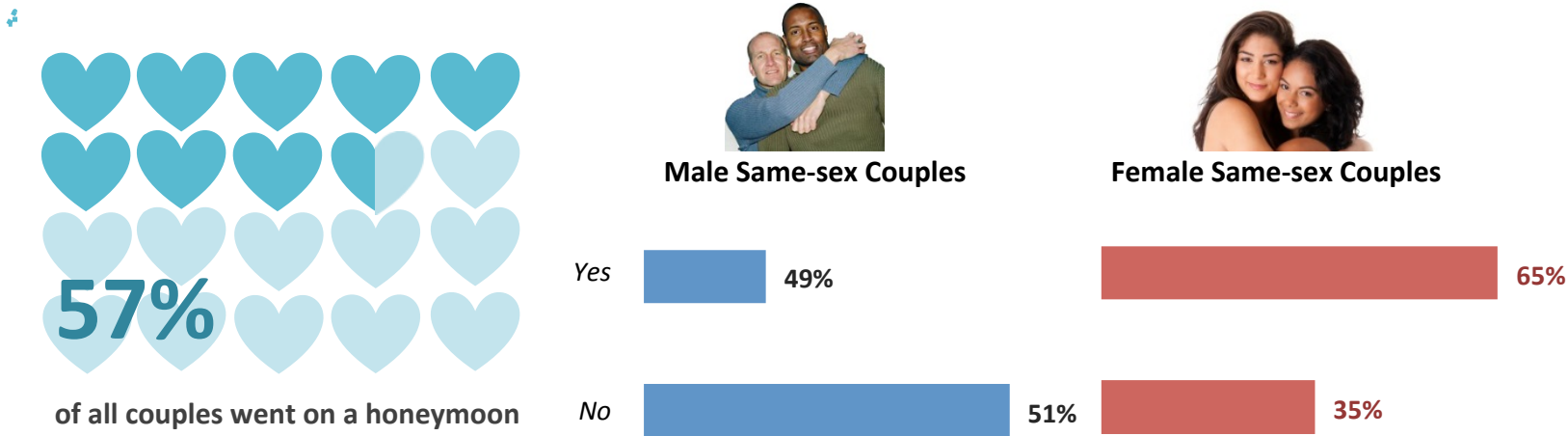
Among Married, CU, DP or Engaged



Base: Married/CU/DP/Engaged n=466

From CMI’s 2013 Same-Sex Wedding Survey: A slight majority (57%) of same-sex couples indicated going on a honeymoon after their ceremony. There was no clear winner for honeymoon destinations. Responses varied widely across the United States, Canada and Europe. The destination with the highest number participants was Hawaii, but that only represented 7% of couples.

Did you go on a honeymoon after your wedding, and if so, where?
Among Married, CU or DP

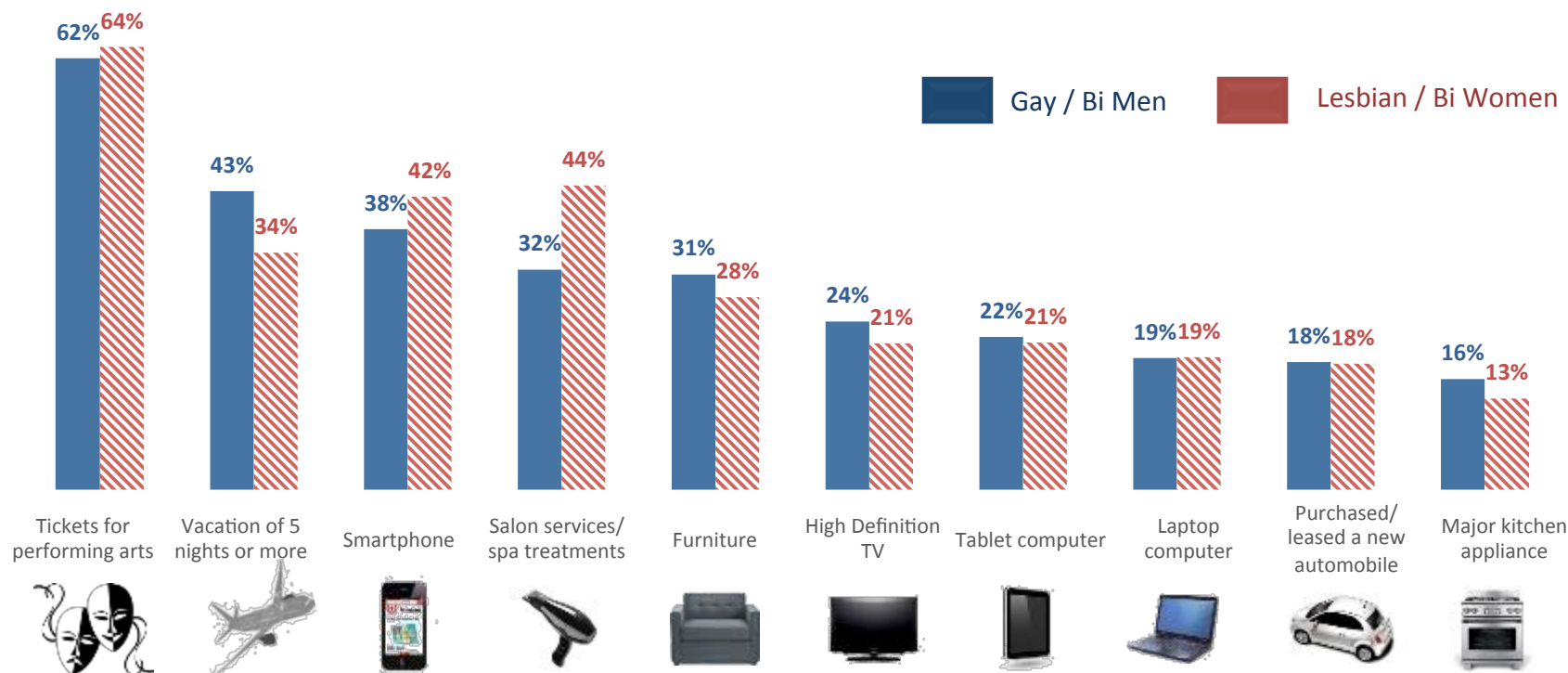


Base: Married, CU or DP: All LGBT n=360; Male Same-sex Couples n=198; Female Same-sex Couples n=147

From CMI's 2013 LGBT Community Survey®

In the past year, nearly 40% of LGBTs indicated taking a major vacation of five nights or more. Travel is clearly an LGBT priority compared to other major purchases.

Top Purchases, Past Year



Base: Gay/Bi Men n=10,866; Lesbians/Bi Women n=4,096

Connect with us to learn even more...

Community Marketing has helped business leaders understand and successfully connect with the lesbian, gay, bisexual and transgender (LGBT) communities since 1992.

Welcome!



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*Community Marketing, Inc. is an NGLCC Certified
LGBT Owned Business Enterprise.*

About **Community Marketing & Insights**: The facts are plain: As a “niche market segment,” gay men and lesbians have a significant amount of disposable income. Most critically, their dollars go to product and service suppliers that recognize their unique buying motivations and preferences, and offer them differentiated value.

Community Marketing, Inc. (CMI) has been helping a wide variety of industry leaders master the subtleties of this market **since 1992**. Our unique and specialized services are based on 20+ years of experience and case studies, and include market research (online surveys, focus groups, intercepts, interviews, advisory boards, etc.), with our proprietary panel of 70,000+ LGBT consumers; strategic consulting; marketing planning, and marketing plan implementation/management. We produce custom, on-site training sessions, develop conferences, symposia and webinars, and speak at industry events.

Whether your organization is just learning about the market, or is updating its strategy, **Community Marketing & Insights** can accelerate your plans, reduce your risks and deliver *measurable* results. Because the LGBT community comprises a “slice” of the world’s population, there is no singular “gay market.” You’ll find singles, couples and families in every age and ethnicity. And you’ll find a world of diverse interests. CMI’s proven, powerful portfolio of services helps deliver your targeted markets.

Community Marketing & Insights has earned its position as the global leader in LGBT market research and development. Through the company’s tireless efforts, “doors have opened” around the world for gay and lesbian consumers. We have helped grow LGBT market recognition through research, media relations and education; and have brought opportunities to many of the world’s leading marketers.

CMI **Community Marketing & Insights** projects and training include:

- ABSOLUT (Pernod Ricard)
- Aetna Insurance
- American Cancer Society
- Blue Cross/Blue Shield
- Chicago History Museum
- E. & J. Gallo Winery
- Esurance (an Allstate Company)
- Gilead Pharmaceuticals
- Hyatt Hotels & Resorts
- Japan Air Lines
- Japan National Tourism Organization
- Kaiser Family Foundation (> Than AIDS campaign)
- Kimpton Hotels & Restaurants
- MetLife
- MillerCoors Brewing Company
- NYC & Co.
- Prudential Financial
- Switzerland Tourism
- Target Brands
- U.S. Government: Census Bureau, and HUD (Housing & Urban Development)
- Visit Philadelphia
- Wells Fargo Bank
- Wyndham Vacation Ownership

And many others

CMI'S LGBT

CONSUMER RESEARCH PANEL 2013-14

DID YOU KNOW...?

Gay men and lesbians own more homes and cars, travel more, spend more on electronics, and have the largest amount of disposable income of any niche market. And it's a sizeable niche: LGBT consumers make up 5% or more of the U.S. consumer market. Community Marketing & Insights will help you connect with this influential demographic.

CMI'S LGBT CONSUMER PANEL: WHAT MAKES IT UNIQUE?

- **Accurate, targeted market intelligence**

Utilizing quantitative and qualitative market research methodologies, Community Marketing & Insights helps companies better understand and more effectively reach the LGBT community. Our consumer panel provides insights through online surveys, focus groups, intercepts and more.

- **The largest, most representative panel**

With over 20 years in business, Community Marketing & Insights has developed a research panel of more than 70,000 LGBT consumers. We've partnered with media outlets and LGBT-oriented organizations and events throughout the country and around the world to recruit a qualified panel that is geographically representative of the LGBT population.

- **Candid responses, honest feedback**

As an LGBT-owned and -operated firm, we've established trust with our panelists. We speak their language and know how to communicate effectively with them. As a result, our panelists are willing to talk with us frankly and frequently, even about sensitive issues.

- **Community Marketing & Insights experience & expertise**

Since 1992, Community Marketing & Insights has provided market research, strategic consulting and marketing planning services to a wide variety of clients. We've provided LGBT consumer intelligence to numerous market leaders like Wells Fargo Bank, Target Brands, Prudential, ABSOLUT Vodka, Travelocity, MillerCoors Brewing Co., Japan National Tourism Organization, E&J Gallo Wineries, OraSure Technologies, Chicago History Museum, Tourism Toronto, MetLife, Hyatt Hotels & Resorts, and many companies, as well as the American Cancer Society, Kaiser Family Foundation and the U.S. Government (Census Bureau and H.U.D.).

We also present public and custom onsite educational seminars and workshops. Community Marketing & Insights has produced or presented at LGBT marketing symposia on six continents.

Learn more on our website, www.communitymarketinginc.com



SAMPLE DEMOGRAPHICS OF USA LGBT PANELISTS

48 MEDIAN AGE

47% LIVE WITH PARTNER

55% COLLEGE GRADUATES

68% ARE EMPLOYED

60% HHI >\$50K

6% PURCHASED A HOME IN THE PAST 12 MONTHS

7% PLAN TO PURCHASE A HOME IN THE NEXT 12 MONTHS

39% PURCHASED A SMARTPHONE IN THE PAST 12 MONTHS

24% PLAN TO PURCHASE A SMARTPHONE IN THE NEXT 12 MONTHS

39% DRINK WINE WEEKLY

39% DRINK BEER WEEKLY

45% DRINK SPIRITS OR COCKTAILS WEEKLY

PAST 12 MO. PURCHASES

40% MAJOR VACATIONS

18% AUTOMOBILE

39% SMARTPHONE

19% LAPTOP COMPUTER

23% HDTV

30% FURNITURE

22% TABLET COMPUTER

63% PERFORMING ARTS TICKETS

15% MAJOR KITCHEN APPLIANCES

12% E-READER

25% LGBT FUNDRAISING GALA TICKETS

40% "LIKED" A BUSINESS ON FACEBOOK

65% READ LGBT BLOGS / WEBSITES

31% CLICKED ON A FACEBOOK AD

15% CLICKED ON A MOBILE APP AD

60% MAKE REGULAR DONATIONS TO 1+ NON-PROFITS OR CHARITIES

AND MORE!

LGBT Market Research:

There is a difference!

Market research studies and resulting statistics are meant to help marketers understand the LGBT communities, and influence educated decisions about their strategies and tactics. However, *not all research is the same*. **Community Marketing & Insights** methodologies and experience are distinct from those of others when considering approaches, respondent panels—and ultimately—the validity and utility of sought-after results.

WHO ARE YOU TALKING TO?

Community Marketing & Insights (CMI) has developed our proprietary consumer panel over the past 20+ years by circulating field surveys at leading LGBT events, and by partnering with LGBT organizations and media across the USA, Canada, the UK, and around the world. These partners distribute our survey invitations via print ads, web banners, email broadcasts and social networks to their memberships and/or readers. The resulting panels are highly representative of LGBT consumers who interact with the LGBT community and media. *This is important:* If your communications channels are via the LGBT media, you'll want to depend on research that represents these consumers' interests, preferences, sensitivities and motivations. CMI research is trusted by—and frequently quoted in—the *New York Times*, *USA Today*, the *Wall Street Journal*, *Forbes*, *Chicago Tribune*, *Los Angeles Times*, *Miami Herald*, *Ad Week*, *NPR*, *CBS News*, *Associated Press*, etc.

Other providers typically send out widely distributed panel invitations (via Yahoo, etc.), and then sort for those who trust the researcher enough to indicate that they are gay or lesbian in the context of a survey. This approach, attempting to "represent the gay community at large," may be appropriate for direction in sociological or academic studies, but not for developing clear, representative advertising or marketing related strategies. Other researchers use lists from one or two LGBT publishers, which may skew results. For marketers desiring valid LGBT consumer insights about products, services, advertising creative and marketing strategies, these panel development approaches are not likely to yield LGBT community members who are interacting with the media where you are placing ads.

IN RESEARCH, SIZE DOES MATTER.

CMI has conducted over a hundred LGBT-dedicated research studies since the early '90s, covering a wide variety of topics, industries and interests. Through our work, we both observe and influence the trends of this market. Size does matter in the case of research. Our research panel has grown to over 70,000 qualified LGBT consumers, the largest of its kind, by far. Our 6th Annual LGBT Community Survey® study attracted over 45,000 survey participants, representing 148 countries, making it the largest such study in history. We leverage our long history / experience / expertise for your benefit, and fine-tune our portfolio of research panels, methodologies and approaches to best match your market intelligence goals.

Without access to this enormous resource of qualified LGBT consumer panelists, other companies have to compromise on the quality and demographic representation of the panel, or "reinvent the wheel" at your expense. One cannot fathom the diversity and complexities within LGBT (see below) on a small sample. And with small samples, you lose the opportunity to derive statistically-significant cross tabs on gender, geographical location, age, income, experience, product choice, etc. Can you really make the assumption that a 28 year old lesbian in Seattle has the same purchasing motivations and behaviors as a 67 year old gay man in Atlanta? Generalities and sweeping statements about "the gay market" based on comparatively small samples can distort the results of research findings, potentially wasting your investment of time and resources.

DIVERSITY: THERE IS NO "LGBT MARKET"

Community Marketing & Insights emphasizes that there is no "gay market," just as there is no singular "Asian market." The LGBT communities represent a broad and dynamic spectrum of interests, sensitivities, preferences and priorities. Those, plus variations in geographical location, age, income, relationship status, gender identity and more, make it even more important to discover which opportunities *within LGBT* will help you achieve your goals. Fine tuning your approaches based on highly refined and well-targeted matches within LGBT will make your outreach initiatives more efficient and cost-effective, and will significantly improve your marketing ROI.

General surveys on "the gay market" are likely to only scratch the surface of the diversity and varieties of opportunities marketers can enjoy if properly explored and understood.

continues...

TWO SIDES OF THE COIN: QUANTITATIVE AND QUALITATIVE

Since 1994, CMI has taken pride in operating the most consistent, longest-running series of LGBT community surveys in the world. But we don't stop there. *Quantitative* (data) research is one important side of a coin, but only tells half of the story. The other side of a comprehensive research initiative involves *qualitative* research, most notably derived from focus groups. We pre-qualify our focus group participants from among our survey panelists, identifying the best candidates based on characteristics such as age, gender, relationship status, geographical location, and even a propensity or history of using the client's products or services. We maintain sufficient numbers of panelists to conduct groups in most major metro areas across the USA, Canada, UK, Germany and Australia, as well as many secondary markets. We've found that the same creative, tested in different regions, often yields substantially differing results. Isn't it wise to know that—and adjust your plans—before investing in marketing campaigns? CMI is the *only* LGBT-dedicated research provider that produces and facilitates LGBT focus group studies and other *qualitative* research options. We have developed and reported on focus groups covering a wide variety of topics, plus we have operated telephone interviews, field surveys, advisory board series and multi-year customer satisfaction survey projects which can round out a comprehensive market intelligence plan.

Producing only online surveys, other research companies are telling half of the story (at best). Without actual consumer interaction, they cannot fathom the deeper insights hiding behind the bar graphs and pie charts, nor can they adequately advise you on the sensitivities and complexities that are only uncovered in qualitative research... extremely important considerations that averages and extrapolated assumptions based only on survey statistics are likely to miss.

WE DON'T OUTSOURCE!

Community Marketing & Insights maintains our own research panels and utilizes advanced, sophisticated research software. We do all of our research in-house, because nobody knows this market segment as well as we do. We never sell or rep another company's services, nor will we outsource your project to a 3rd party.

Some firms work as reps of research companies, or outsource clients' projects, and report on the results of the 3rd party's work. But without being intimately involved in every aspect of the project, from discussing the client's goals and designing the study, to building the survey, implementing it and writing the report, and without engaging directly with consumers in focus groups, it is difficult to gain the insights that can only come from CMI's hands-on LGBT research specialization spanning nearly two decades.

TRUSTED

Community Marketing, Inc., founded in 1992, pioneered LGBT consumer research. Because we are LGBT-owned and -operated and well known in the community, we have earned the recognition and trust of our survey panelists. LGBT consumers recognize that we use research data to build corporate relationships, which ultimately lead to better conditions for LGBT employees, social progress, and sensitive communications.

PROUDLY LGBT-OWNED AND -OPERATED

One of the questions in HRC's Corporate Equality Index application is whether the applicant company includes LGBT-owned suppliers when sourcing products and services. When you contract with Community Marketing, you not only gain the benefit of our long-standing leadership in this field, you are working with one of the only LGBT-owned market research providers. Community Marketing, Inc. is an NGLCC Certified LGBT-Owned Business Enterprise.

COMMUNITY CITIZENSHIP

CMI is involved in the LGBT community: We volunteer time, donate resources and raise funds for numerous community-based organizations. We also participate in the community's leading business and advocacy organizations, events and conferences, such as Out & Equal, HRC, National Gay & Lesbian Chamber of Commerce, GLAAD, NCLR, International Gay & Lesbian Travel Association, National Lesbian & Gay Journalists Association, etc. This community connection is not only the right thing to do, it is essential for initiating appropriate relationships for our clients.

VALUE

You'd think that with this kind of specialization and experience, you'd be investing considerably more for **Community Marketing & Insights** services than for research from other companies. But it is due to our specific focus on LGBT market intelligence, and the cumulative 60+ years of dedicated LGBT research among the CMI team, that we can actually keep your costs low. We are not spending your money to locate qualified survey or focus group participants, nor are we spending our time (or your money) trying to source comparative data or case studies. We've done all that over the past 20 years for your benefit. And we are not running a large operation that juggles many accounts and projects of differing scope and focus. CMI's client dedication and market specialization delivers you superior intelligence at a fraction of the cost of other firms.